



# ADDY NOTES



## Adding Comments and Attachments to an ePro Requisition

This Addy Note will show you how to add both header and line comments to your requisition as well as show you how to attach a document. Comments assist in the flow of your requisition, result in a faster turnaround time, and are an essential part of the requisition process. Create a header comment when the comment pertains to the entire requisition; create a line comment when the comment pertains to a specific line. The same rule applies to attachments.

There are five commonly used, predefined comments:

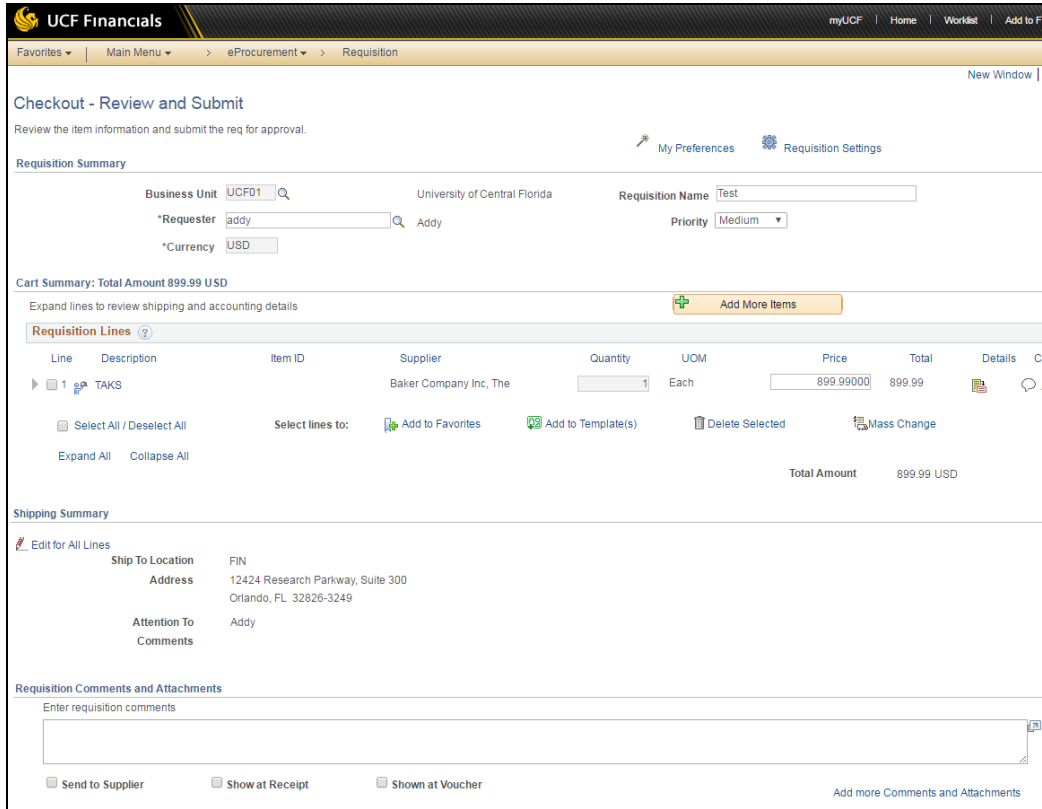
Comment Type	Comment ID	Header or Line Comment?	Description
AST	A001	Line	<b>Asset Required Information</b> is required for all asset line items to identify the asset location, tag type, and estimated life.
DEP	D001	Header	<b>Requester Information</b> is required for all requisitions to identify the requester's name, phone number, location, and department (except Travel-related requisitions).
DEP	D004	Header	<b>Increase Blanket PO</b> is required if a change is needed to an order after a requisition has been sourced to a PO.
DEP	D005	Header or Line	<b>Requisition Attachment</b> is required when documents are attached to the requisition.
TVL	T001	Header	<b>Travel Required Information</b> is required for all travel-related requisitions.



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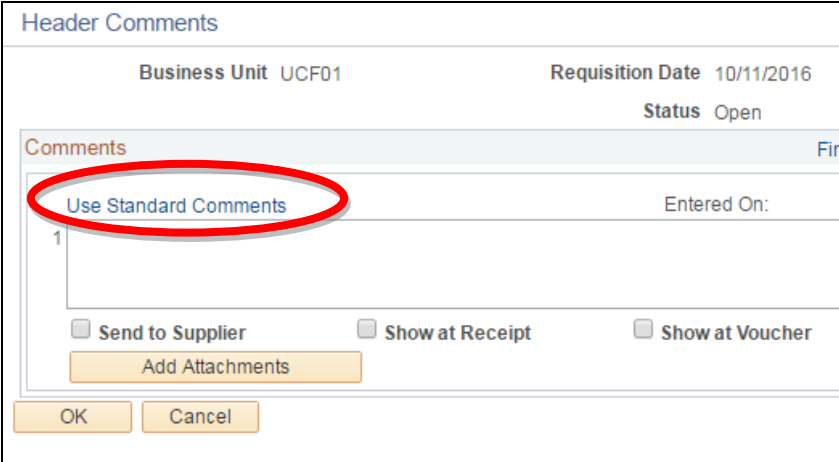
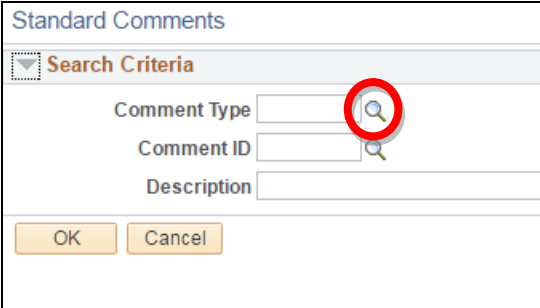
Follow the steps below to add a header comment to your requisition.

Step	Action
1.	<p>When adding comments to a <b>new</b> requisition, add the comments on the <b>Checkout - Review and Submit</b> page after you've entered all your lines.</p> 
	<p>If you are adding comments to an <b>existing</b> requisition, use the <b>Manage Requisitions</b> page to search for the requisition; from the displayed search results, select the <b>Edit Requisition</b> option from the dropdown list for the requisition you need to edit, and click the <b>Go</b> button.</p> <ul style="list-style-type: none"> <li>• If the requisition's status is "Open," the <b>3. Review and Submit</b> page displays.</li> <li>• A warning message will display if you select a requisition for editing with a status of "Pending" approval or "Approved." Editing a submitted requisition may require that you resubmit it through the workflow approval process. If</li> </ul>



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Step	Action
	you receive a warning message, click the <b>OK</b> button, if applicable.
2.	<p>To add a standard header comment, click the <b>Add more Comments and Attachments</b> link.</p> 
3.	<p>Click the <b>Use Standard Comments</b> link.</p> 
4.	<p>Select the <b>Comment Type</b> lookup icon.</p> 



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<p>5.</p>	<p>Select the appropriate comment type from the search results.</p> <div data-bbox="321 520 927 1178" style="border: 1px solid black; padding: 5px;"> <p><b>Look Up Comment Type</b></p> <p>SetID UCF01</p> <p>Standard Comment Type <input type="text" value="begins with"/>   <input type="text"/></p> <p>Description <input type="text" value="begins with"/>   <input type="text"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> Basic Lookup</p> <p><b>Search Results</b></p> <p>View 100 First 1-11 of 11 Last</p> <table border="1"> <thead> <tr> <th>Standard Comment Type</th> <th>Description</th> </tr> </thead> <tbody> <tr><td>AST</td><td>Asset Related Information</td></tr> <tr><td>AUT</td><td>Authority Comments</td></tr> <tr><td>BU</td><td>Business Unit Terms &amp; Conditio</td></tr> <tr><td>CLA</td><td>Clauses</td></tr> <tr><td>CON</td><td>Contracts</td></tr> <tr><td>CST</td><td>Construction</td></tr> <tr><td>DEP</td><td>Departmental Comments</td></tr> <tr><td>EXE</td><td>Exemptions</td></tr> <tr><td>RCV</td><td>Receiving Statements</td></tr> <tr><td>ROT</td><td>Reimbursement Other Than Travel</td></tr> <tr><td>TVL</td><td>Travel Required Information</td></tr> </tbody> </table> </div>	Standard Comment Type	Description	AST	Asset Related Information	AUT	Authority Comments	BU	Business Unit Terms & Conditio	CLA	Clauses	CON	Contracts	CST	Construction	DEP	Departmental Comments	EXE	Exemptions	RCV	Receiving Statements	ROT	Reimbursement Other Than Travel	TVL	Travel Required Information
Standard Comment Type	Description																								
AST	Asset Related Information																								
AUT	Authority Comments																								
BU	Business Unit Terms & Conditio																								
CLA	Clauses																								
CON	Contracts																								
CST	Construction																								
DEP	Departmental Comments																								
EXE	Exemptions																								
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ROT	Reimbursement Other Than Travel																								
TVL	Travel Required Information																								
<p>6.</p>	<p>Select the <b>Comment ID</b> lookup icon.</p> <div data-bbox="321 1262 862 1570" style="border: 1px solid black; padding: 5px;"> <p><b>Standard Comments</b></p> <p><input type="checkbox"/> Search Criteria</p> <p>Comment Type <input type="text"/> <input type="button" value="lookup"/></p> <p>Comment ID <input type="text"/> <input type="button" value="lookup"/></p> <p>Description <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>																								
<p>7.</p>	<p>Select the appropriate comment ID.</p>																								



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8. Click **Search**. Do not click **OK**.

Standard Comments

▼ Search Criteria

Comment Type DEP

Comment ID D001

Description

Search

Reset

Cancel

**Note:** You **do not** need to add a description in the **Description** field.

9. Select the **Comment**.

Standard Comments

▼ Search Criteria

Comment Type DEP

Comment ID D001

Description

Search

Reset

▼ Standard Comments Find First 1 of 1 Last

Select	Comment Type	DEP	Comment ID	D001
<input checked="" type="checkbox"/>	Description	Requestor Information		

Name of requestor:  
Phone Number:  
Building & Room No.:  
Dept. Name:  
FAX No:

Append To Comments

Override Comments

OK Cancel



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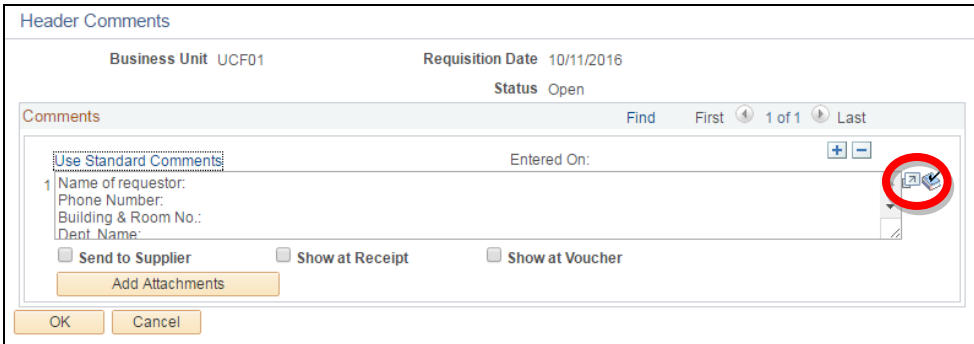
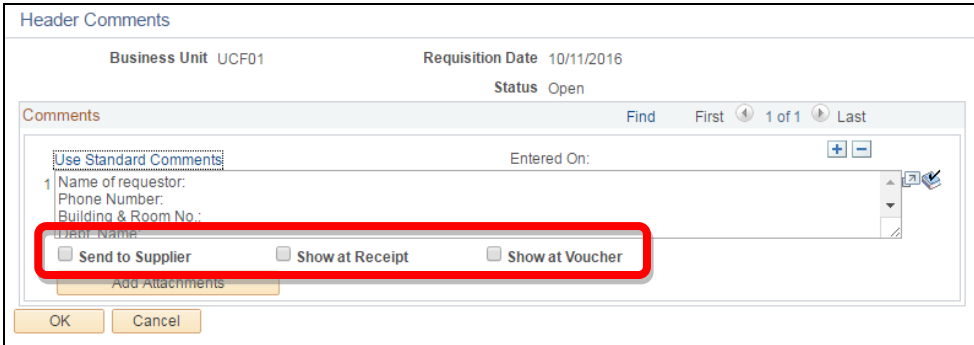


<p>10.</p>	<p>Now, you can choose between <b>Append to Comments</b> or <b>Override Comments</b>:</p> <ul style="list-style-type: none"> <li>•<b>Append to Comments.</b> Adds the selected comment to existing comments.</li> <li>•<b>Override Comments.</b> Deletes all existing comments and replaces them with the selected comment.</li> </ul> <p>Since there are no existing comments, accept the default <b>Override Comments</b>.</p> <div data-bbox="321 793 1206 1402" style="border: 1px solid black; padding: 5px;"> <p>Standard Comments</p> <p>▼ Search Criteria</p> <p>Comment Type <input type="text" value="DEP"/> <input type="button" value="Search"/></p> <p>Comment ID <input type="text" value="D001"/> <input type="button" value="Reset"/></p> <p>Description <input type="text"/></p> <hr/> <p>▼ Standard Comments <span style="float: right;">Find First 1 of 1 Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Select</th> <th>Comment Type</th> <th>Description</th> <th>Requestor Information</th> <th>Comment ID</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">DEP</td> <td colspan="2" style="font-size: small;">Name of requestor: Phone Number: Building &amp; Room No.: Dept. Name: FAX No:</td> <td style="text-align: center;">D001</td> </tr> </tbody> </table> <p> <input type="radio"/> Append To Comments  <input checked="" type="radio"/> <b>Override Comments</b> </p> <p style="text-align: center;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>	Select	Comment Type	Description	Requestor Information	Comment ID	<input checked="" type="checkbox"/>	DEP	Name of requestor: Phone Number: Building & Room No.: Dept. Name: FAX No:		D001
Select	Comment Type	Description	Requestor Information	Comment ID							
<input checked="" type="checkbox"/>	DEP	Name of requestor: Phone Number: Building & Room No.: Dept. Name: FAX No:		D001							
<p>11.</p>	<p>Click <b>OK</b>.</p> <div data-bbox="321 1486 675 1709" style="border: 1px solid black; padding: 5px;"> <p> <input type="radio"/> Append To Comments  <input checked="" type="radio"/> <b>Override Comments</b> </p> <p style="text-align: center;"><input checked="" type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>										



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<p>12.</p>	<p>Click the <b>Display Comment Modal Window</b> icon to edit the comment. You can also edit the comment by clicking the text-box and typing free-form.</p> 
<p>13.</p>	<p>Enter the appropriate information. Don't forget to add <b>your initials and date</b> at the bottom.</p>
<p>14.</p>	<p>Click <b>OK</b>.</p>
<p>15.</p>	<p>There are three different check boxes: <b>Send to Supplier</b>, <b>Show at Receipt</b>, and <b>Show at Voucher</b>.</p>  <ul style="list-style-type: none"> <li>• <b>Send to Vendor:</b> By clicking this check box, the comment will display on the purchase order for the vendor to view.</li> <li>• <b>Show at Receipt:</b> By clicking this check box, the comment will display for the person/department performing the receiving.</li> <li>• <b>Show at Voucher:</b> By clicking this check box, the comment will display for Accounts Payable.</li> </ul>



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	<ul style="list-style-type: none"> <li>• <b>Approval Justification:</b> By clicking this check box, the comment will display on the <b>Confirmation</b> page as well as display for the approver.</li> </ul> <p>The Approval Justification option is only available for the first header comment. Therefore, it is crucial that any comments the approver needs to see go in the first header comment.</p> <p>If the box is not selected, the comment will only display as a header comment.</p> <p>For this example, select the <b>Approval Justification</b> check box.</p>
	<p>If you want to add an additional comment to an existing header comment, click the <b>Use Standard Comments</b> link.</p> <div data-bbox="321 940 1159 1402" style="border: 1px solid black; padding: 5px;"> <p>Header Comments</p> <p>Business Unit UCF01      Requisition Date 10/11/2016</p> <p>Status Open</p> <p>Comments</p> <p><b>Use Standard Comments</b>      Entered On:</p> <p>1</p> <p><input type="checkbox"/> Send to Supplier      <input type="checkbox"/> Show at Receipt      <input type="checkbox"/> Show at Voucher</p> <p>Add Attachments</p> <p>OK      Cancel</p> </div>
<p>16.</p>	<p>To create a new, separate comment, click the <b>Add (+)</b> icon to add a new comment row.</p> <div data-bbox="321 1524 813 1789" style="border: 1px solid black; padding: 5px;"> <p>Find    First    1 of 1    Last</p> <p><b>+</b></p> </div> <p>For this example, click the <b>Add (+)</b> icon.</p>





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17. There are now two comment rows. You can click the [Use Standard Comments](#) link to add a comment.

Header Comments

Business Unit UCF01      Requisition Date 10/11/2016  
Status Open

Comments      Find      First      1-2 of 2      Last

1	<a href="#">Use Standard Comments</a> Entered On: 10/11/2016 9:58:28AM <span style="float: right;">+ -</span>	1/2	✖
Name of requestor: Phone Number: Building & Room No.: Dept. Name:			
<input type="checkbox"/> Send to Supplier <input type="checkbox"/> Show at Receipt <input type="checkbox"/> Show at Voucher			
Add Attachments			
2	<a href="#">Use Standard Comments</a> Entered On: 10/11/2016 10:20:56AM <span style="float: right;">+ -</span>	1/2	✖
Employee's Moving Expense-This purchase order for an employee's moving expense has been approved by the cognizant Vice President and/or Provost (President's approval needed for moves exceeding 15,000 pounds).			
<input type="checkbox"/> Send to Supplier <input type="checkbox"/> Show at Receipt <input type="checkbox"/> Show at Voucher			
Add Attachments			

OK      Cancel

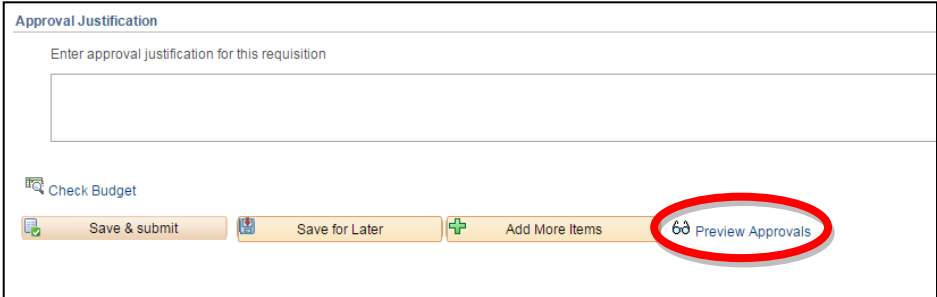
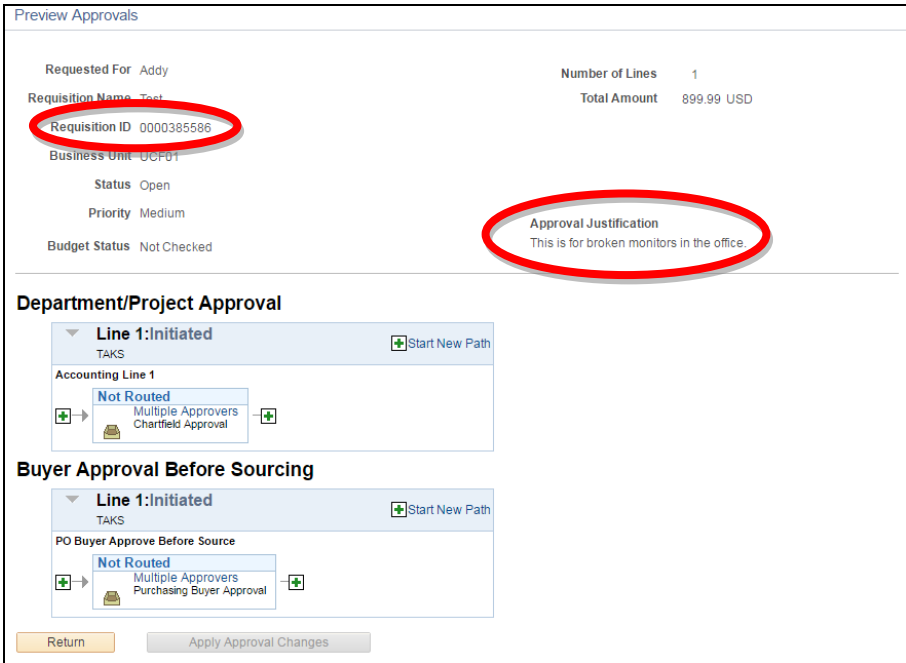
For this example, click the **Remove (-)** icon to delete the second comment.

18. Click **OK**.



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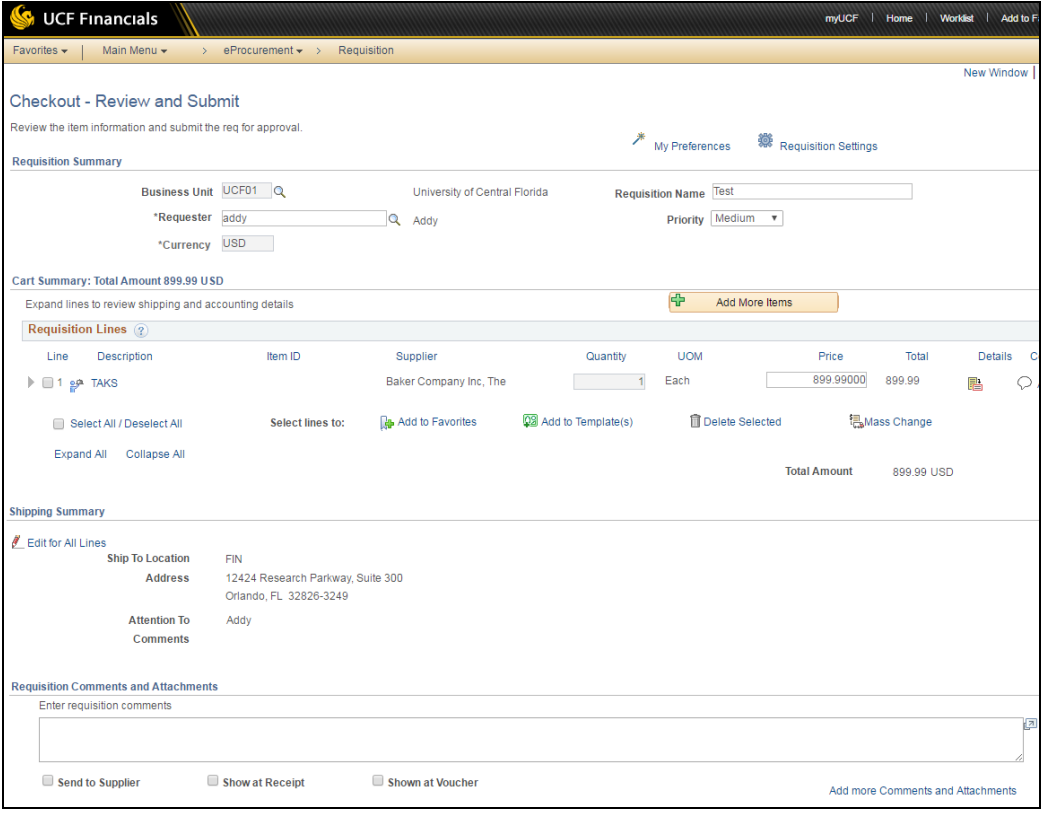
<p>19.</p>	<p>On the <b>Checkout - Review and Submit</b> page that displays, click the <b>Preview Approvals</b> link.</p> 
<p>20.</p>	<p>The <b>Confirmation</b> page displays with the comment in the <b>Justification</b> section and a UCF Financials assigned requisition number.</p> 
<p>21.</p>	<p>Click the <b>Check Budget</b> button. The approval status changes from “Initiated” to “Pending.”</p>
<p>22.</p>	<p>Verify the <b>Budget Status</b> is “Valid” and click the <b>Submit</b> button to complete your requisition and enter it into workflow.</p>



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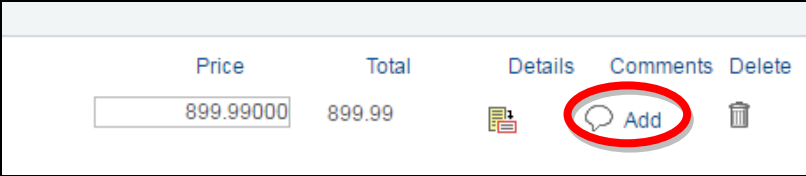
Follow the steps below to add a line comment to your requisition.

Step	Action
1.	<p>When adding comments to a <b>new</b> requisition, add the comments on the <b>Checkout - Review and Submit</b> page after you've entered all your lines.</p> 
	<p>If you are adding comments to an <b>existing</b> requisition, use the <b>Manage Requisitions</b> page to search for the requisition; from the displayed search results, select the <b>Edit Requisition</b> option from the dropdown list for the requisition you need to edit, and click the <b>Go</b> button.</p> <ul style="list-style-type: none"> <li>• If the requisition's status is "Open," the <b>3. Review and Submit</b> page displays.</li> <li>• A warning message will display if you select a requisition for editing with a status of "Pending" approval or "Approved." Editing a submitted requisition may require that you resubmit it through the workflow approval process. If you receive a warning message, click the <b>OK</b> button, if applicable.</li> </ul>



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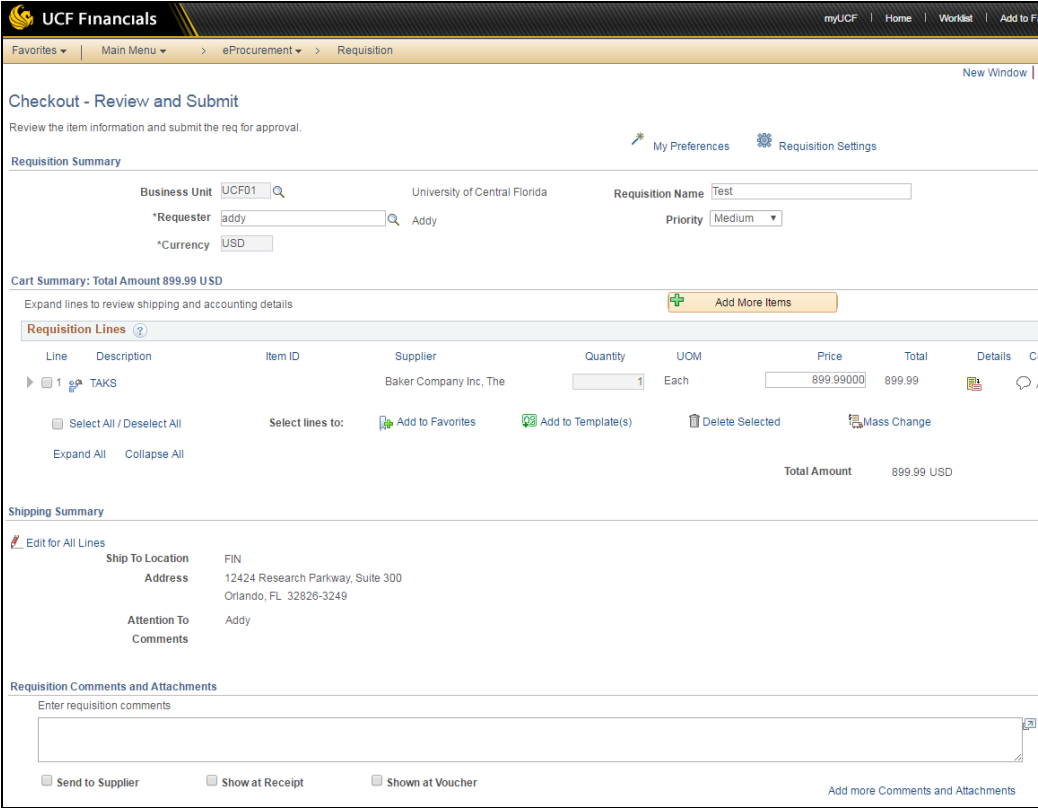
Step	Action
2.	<p>Click the <b>Line Comments</b> icon for the line item.</p> 
3.	<p>Now, follow the same steps for creating a header comment. <a href="#">Click here</a> to review steps 3-22 of adding header a comment.</p>



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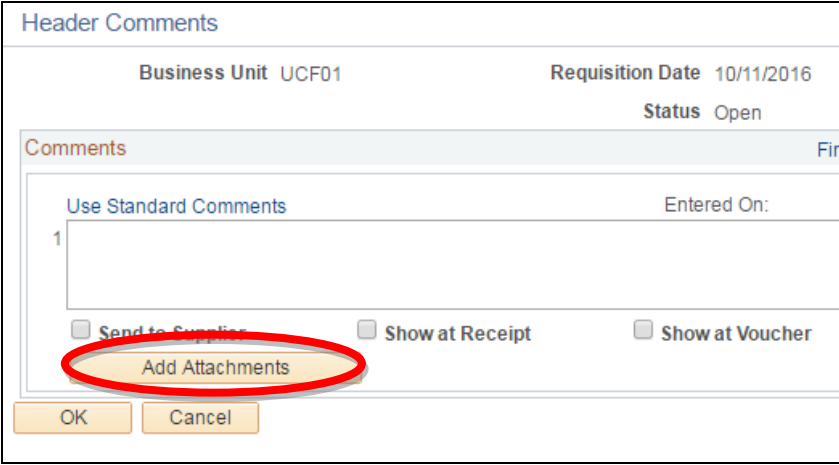
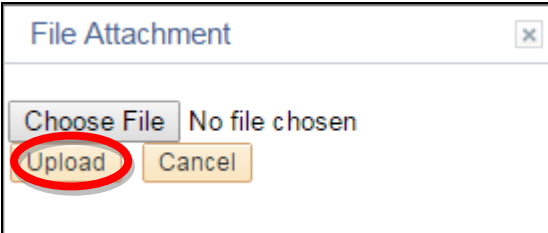
Follow the steps below to add an attachment to your requisition.

Step	Action
1.	<p>When adding attachments to a <b>new</b> requisition, add the comments on the <b>Checkout - Review and Submit</b> after you've entered all your lines.</p> 
	<p>If you are adding attachments to an <b>existing</b> requisition, use the <b>Manage Requisitions</b> page to search for the requisition; from the displayed search results, select the <b>Edit Requisition</b> option from the dropdown list for the requisition you need to edit, and click the <b>Go</b> button.</p> <ul style="list-style-type: none"> <li>• If the requisition's status is "Open," the <b>3. Review and Submit</b> page displays.</li> <li>• A warning message will display if you select a requisition for editing with a status of "Pending" approval or "Approved." Editing a submitted requisition may require that you resubmit it through the workflow approval process. If you receive a warning message, click the <b>OK</b> button, if applicable.</li> </ul>



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<p>2.</p>	<p>Click the <b>Add more Comments and Attachments</b> link.</p> 
<p>3.</p>	<p>Click <b>Add Attachments</b>.</p> 
<p>4.</p>	<p>Click <b>Choose File</b>.</p>
<p>5.</p>	<p>Once you have selected the file you want to use, click <b>Upload</b>.</p> 
<p>6.</p>	<p>Click <b>OK</b>.</p>
<p>7.</p>	<p>Click the <b>Check Budget</b> button.</p>



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8. Verify the **Budget Status** is “Valid” and click the **Save & Submit** button to complete your requisition and enter it into workflow.

Approval Justification	
Enter approval justification for this requisition	
<input type="text"/>	
 Check Budget	Budget Checking Status: <b>Valid</b>